



# CEdMA Blog

## Connecting Customer Success With Customer Education

Posted by Sarah Sedgman on 8/21/2023



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When it comes to most software solutions, customers have numerous options and switching between solution providers has become easier and more cost-effective. To secure customer loyalty it is crucial that customers feel that they are deriving value from the software and in fact, can't live without it.

Having the right features is a must-have but ensuring that customers know how to use the software and are on their way to becoming power users ensures greater customer stickiness. This is where customer education comes in, and in this article, I will talk about how the customer education team should insert itself into customer success workflows for greater customer satisfaction.

## Customer Success And Its Role

Customer success is the proactive and strategic approach to ensure that customers achieve their desired goals and receive maximum value from the products or services they have purchased. From a software-as-a-service (SaaS) perspective, in addition to teaching customers how to use the software, customer success often builds strong, long-term relationships with customers and becomes a trusted advisor.

To enable trust and growth in the relationship, it is vital that customer success is well-versed on the product and can help customers through their objectives - this is where customer education can shine.

## What Customer Education Can Do For Customer Success

To help clients achieve their desired outcomes and maximize the value they receive from the products or services they have purchased, customer education can deliver tools and resources that are tailored to where the customer is in within their product lifecycle. The following are common responsibilities and activities of a customer success team and how customer education can support.

### Onboarding and implementation

The onboarding process ensures that new customers transition from the sales process to using the product or service effectively. From a customer education perspective, this is where companies may offer instructor-led training, self-paced learning or a blend of both. For in-person formal training, it might either be onsite or virtual, while on-demand courses might be eLearning, microlearning and videos.

To support the onboarding and implementation phase, customer education should plan to provide the learning paths that clients need to take to become proficient with the product or service. Once the learning journey has been established, build the presentations for instructor-led training and the eLearning/microlearning/video for the self-paced learning. Regardless of the type of training, don't forget to include hands-on exercises, step-by-step guides or instructions, interactions like games and assessments/tests to test knowledge. Providing a sandbox environment where customers can "play" is another powerful tool to teach customers.

It's important to build the learning paths alongside the onboarding of the customers, so that they have the right learning at the right time and not all at once. Also, consider the different roles during the implementation and rollout of your software solution and ensure they also have training at the right time along the customer journey.

### Ongoing product or service education

Once the client has the basic knowledge, it is time to get the client deeply connected with the company's product or service. Customer success will be engaging with the client to teach them specific areas about the product/service or answer any questions.

This segment in the customer lifecycle might be hardest to build learning paths and require the greatest number of customer education resources but is an important area to invest in as this is the time when clients will become deeply entrenched in the

product. Customer education can support customer success with ongoing product or service education by providing:

**Documentation, FAQs and knowledge base** that covers the product's features in detail. Clients can access these resources for reference and self-paced learning.

**Webinars and workshops** that remind customers of specific topics related to the product. Explore advanced concepts and address challenging use cases. Leave lots of time for questions and answers so clients inquire about the things that they may be struggling with.

**Case studies and success stories** that inspire clients to grow and demonstrate the product's potential. This is not the place to offer one-pagers that are often found on marketing websites. Build deeper and detailed case studies that showcase specific customer needs or industry requirements and how the product/service met those needs.

**Regular updates and training** about new features and improvements in the product and how it is applicable to customers.

## Product expansion

Product expansion, also known as upselling or cross-selling, is the strategy to increase the revenue generated from existing customers by encouraging them to purchase complementary or upgraded products. One way to get customers to use your product in different ways and try more of your offers is to get them more educated. Customer education can support product expansion by providing:

**Webinars** to educate customers on related products and how these help them achieve their day-to-day objectives.

**Advanced training sessions** that delve deeper into specific features and functionalities of the product. Include real-life use case demonstrations to showcase how the product can be applied to different scenarios and advanced tips and tricks that will optimize their experience, streamline workflows, and uncover hidden gems within the product.

**Certifications** that encourage clients to become experts in your product and potentially upgrade to gain access to the additional functionality. Customer education has a role in defining certifications, providing a structured path and content to acquire in-depth knowledge, and assessing client's proficiency.

## Education And Success Working Together

***Side note:** Interesting that we might start seeing the technologies that support both customer success and customer education start to converge (like we've been saying they should!) with the acquisition of Northpass by Gainsight. These are exciting times!*

When customer success and education organizations are coordinated and communicating, then everyone benefits from the same learning experience and a consistent learning outcome. By delivering tools that allow customers success to

engage with clients, customer education is critical to ensuring initial product adoption, value realization, reducing support load and costs, increasing customer retention, supporting customer expansion, and delivering a positive customer experience.

If your customer education team is not aligned with customer success, think about how you can share the right information with the customer success team or your upline managers to drive more efficiency for your company and better value for your customers.

Topics: customer success, customer education

## Laura Laura

10/6/2023, 11:51:03 PM

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¿Sería posible que me dieras un \*número de teléfono\* para discutir los detalles? Gracias.

Reply to *Laura Laura*

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